

**CULPEPER COUNTY CIRCUIT COURT CLERK'S OFFICE
CARSON W. BEARD, CLERK
135 WEST CAMERON STREET
CULPEPER, VA 22701
540-727-3438**

Greetings:

Let me first offer my condolences to you in the loss of your loved one. As you begin to navigate through all that may need to be done, I am hopeful that the information we are providing will assist you.

There is a helpful guide created by The Virginia Bar Association titled *A Guide to the Administration of Decedents' Estates in Virginia*. This guide answers many commonly asked questions about estates from the funeral to qualifying as a personal representative of the estate. You can find it on the Virginia Bar website at [Guide to the Administration of Decedents' Estates in Virginia - The Virginia Bar Association \(vba.org\)](https://vba.org/page/guide_estates) https://vba.org/page/guide_estates

To begin the probate process in this office:

Three forms will need to be completed and can be found at: www.vacourts.gov – go to Forms, Circuit, and Fiduciary - Form 1611 List of Heirs - Form 1650 Probate Information Form – Form 1651 Probate Tax Return. Instructions can be found under each form. *These forms do not need to be signed or notarized.*

You will also need to have an original death certificate and if the decedent had a will, the original will.

To Make an appointment for Probate:

If there is a will, the executor(s) named in the will need to be the person(s) calling to make the appointment and providing the information needed.

If the decedent did not have a will, all the heirs (next of kin) should try to decide together who should be the Administrator(s).

Before calling for an appointment with our probate clerk, please review the attached checklist and have as much information as possible to help expedite the probate process. We will need the completed forms, death certificate, and will prior to scheduling the appointment. These can be dropped off at the Circuit Court Clerk's Office located on the Second Floor in the Courthouse Building or emailed to Culpepercc@vacourts.gov.

Sincerely,



Carson W. Beard
Clerk of Court

CHECKLIST BEFORE CALLING FOR AN APPOINTMENT:

- ___ - Was the decedent a resident of Culpeper or a resident of Culpeper prior to entering a care facility?
- ___ - You are named as an executor in the will or there is not a will and you want to qualify as administrator of the estate.
- ___ - You have completed the List of Heirs, Probate Information, and Probate Tax Return Forms
- ___ - You have an estimated value of the estate, both personal property and real estate
- ___ - You have an Original Death Certificate
- ___ - You have the Original Will

CHECKLIST FOR DETERMINING ASSETS OF THE ESTATE OF DECEDENT:

Did the deceased own any of the following **IN THEIR NAME ONLY**: If there is another person's name on the account as survivor, beneficiary, or payable on death, it would not be considered part of the estate.

CHECKING ACCOUNT(S)	SAVINGS ACCOUNT(S)	STOCK(S)
BONDS	INVESTMENT ACCOUNT(S)	SAVINGS BONDS
MUTUAL FUND	MONEY MARKET ACCOUNT	CERTIFICATE OF DEPOSIT
NOTES RECEIVABLE	ACCOUNTS RECEIVABLE	PENSION INCOME
ANNUITY	TRUST INCOME	OTHER SECURITIES, ETC
MISCELLANEOUS CASH		

Was the deceased the **SOLE OWNER** of any automobiles, boats, trailers, or other similar vehicles?

Did the deceased have an interest in any other estate or trust which had not been distributed to him/her prior to death?

Did the deceased have any life insurance that is payable to the Estate?

Was the deceased engaged in a business as a sole proprietor, partner, limited partner, or corporate partner? The value of the business interest may be included in the estate. If you are unsure about the value or if it should be included in the estate value, we advise you to seek the advice of an attorney.

Did the deceased own any real estate in Virginia? If yes, was the deceased the sole owner of the property?

Did the deceased have Personal Effects? – Such as Household furnishings, jewelry, firearms, etc.

If you answered yes to any of the above, you would need to determine the values, and enter a total on the appropriate line of the Probate Tax Return Form.

Once your appointment has been set, you will need to make sure the original documents are brought to the appointment if they have not been previously submitted. You will also need a valid i.d. (driver's license) and a form of payment – we accept cash, check, credit or debit (there is a 4% fee on credit/debit).